ONLINE SURVEYS AT HOLY FAMILY UNIVERSITY VIA SURVEYMONKEY

For Holy Family University Employee Use ONLY

Survey Monkey and Survey Design Guidelines and Tips

Tailored to Holy Family University Survey Monkey Users

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Introduction

SurveyMonkey.com is a website used for designing, collecting responses, and analyzing the results of online surveys. Whether you are interested in a very basic survey or highly complex research instrument, Survey Monkey can accommodate your needs.

Holy Family University (University) now has its own account with this amazing website for the exclusive use by all University faculty as well as for use by our undergraduate or graduate students with prior approval and under the close supervision of a sponsoring faculty member.

- Survey Monkey provides a series of step-by-step guidelines to cover different features and each tutorial builds on the knowledge of the previous so that users will find it most useful to view the tutorials in sequential order.
- Survey Monkey allows users to create online surveys with an unlimited number of questions, add logos, create custom themes, generate pop-up invitations, filter results, share results, and download results to your computer for further analysis. It also allows summary results to be downloaded into Excel to create graphs and slide show presentations.

Regardless if you are a first-timer or an experienced professional in designing and using online surveys, Survey Monkey is right for you, and the price is right… *it's free for members of our University community.*

For those seeking assistance in learning how to use Survey Monkey or have questions once you get started, David Slowik, Instructional Technologist with the IT Staff, will be happy to help employees with survey design and Survey Monkey use. In addition to assistance from IT, volunteers with online survey experience are available to assist and support users. Contact your division VP or School Dean for the names of those willing to assist faculty.

User Name Authorization

In order to access Survey Monkey and create online surveys, users must have a **Username and Password.** Please contact Cheryl Glover, Research Assistant, Office of Institutional Research and Assessment, cglover@holyfamily.edu or call Extension 3614 for the login information you will need. It changes each month.

Please remember that all online surveys prepared and administered by University faculty, or by students under the supervision of a faculty member, must include a statement that the survey has been reviewed and/or approved by the University's **Institutional Research Board (IRB)**. For more information related to securing IRB approval, please contact the chair of the IRB.

Survey Design Overview

Survey work can be viewed as a three-phase process as presented by the Survey Monkey staff.

1) **Design Phase**
    a. Define study objective
    b. Identify target respondents
    c. Select sample
    d. Identify information you seek from these respondents
    e. Develop questions (and questionnaire) you will use to solicit this information. This includes adding an Introductory Statement, picking question types and options, specifying required VS. optional questions. The professional version of Survey Monkey also allows you to add "Skip Logic" that uses answers to questions to direct respondents to other questions.
2) **Collection Phase**
    a. You can deploy your survey using a URL link created for you by Survey Monkey, or using a link within your website.
    b. Other options for using kiosks also are offered.
3) **Analysis Phase**

a. The analysis and reporting options within the free, **Basic Version** of Survey Monkey are limited to a Summary Report, and Browsing Resulting by Respondent.
b. The **Professional Version** offers several reporting options and results sharing options. Prices start at $ 199. per year.

Links to the help provided by Survey Monkey are provided here, along with highlights and other insights intended to help you as you work with your own surveys.

Links to Survey Monkey Tutorials

We've created a series of tutorials to help you get up to speed. You can either start a tutorial from the beginning, or select a topic that interests you. Survey Monkey Tutorials are listed at http://help.surveymonkey.com/app/tutorials/categorylist

Creating Surveys

How to create a survey

Advanced Skip Logic Design Options

Available question types and formatting options

Collecting Responses

How to distribute your survey through collectors

Posting your survey form on your website

Collecting secure data and privacy best practices

Analyzing Results

How to analyze survey responses

How to open your exports

Advanced Topics

Email Message Formatting Tips

Section 508 Compliancy **:** All Survey Monkey standard survey designs are accessible for respondents with disabilities without changing the appealing look or function of your survey. You do not need to add any special settings or change anything within your

survey design. Surveys are available to anyone using screen reader software, limited to keyboards to enter responses, and anyone with vision impairments that require high-contrast themes. For more information on what Section 508 entails or details on our certification please click here to view our FAQ page.

DOCUMENTATION

- Survey Monkey User Manual (PDF)
- Best Practices for Survey Design (PDF)
- Tips for Improving Response Rates (PDF)
- Accessible Survey Guide (PDF)
- Federal VPAT (PDF)

MOST POPULAR ANSWERS

- The Creating a Survey tutorial explores the basic design elements and provides the steps necessary to get you started.
- SurveyMonkey's question types range from close-ended to open-ended formats.
- BASIC plan features.
- Email the survey to your audience or post the link on your site using a Web Link collector.
- The Collecting Responses tutorial explains what Collectors are and how you can distribute your survey to an audience.

Features of Basic and Professional Plans

a. BASIC Account

The BASIC plan is completely free, and it allows you to create as many surveys as you would like! You are never forced to upgrade, and we do not delete your surveys or data if you do not upgrade by a certain time. You have the ability to share one login and password for multi-user access. Simply have the person(s) you are sharing the account with use the one login and password. We do not assign multiple usernames on individual accounts. Please keep in mind that you are sharing full administrative privileges with other users. Currently, we do not provide the ability for different access levels on the account.

BASIC Features:

- ☐ Up to 10 questions per survey
- ☐ 100 responses per survey (*Upgrade to Pro in order to view all responses.)
- ☐ 15 types of questions
- ☐ Collect responses via weblink
- ☐ Collect responses via email

□ Embed survey within a frame on a website
□ View live results as they are recorded
□ Supports any language, including Unicode
□ Survey completion progress bar
□ Automatic numbering for pages/questions
□ 15 pre-built survey themes
□ Validate/required survey responses
□ Randomize/sort answer choices
□ Accessible and 508 compliant and certified surveys (*U.S. only)
□ Limit of 3 Collectors per survey

Professional Plans:

Survey Monkey offers the following paid plans:
□ SELECT Monthly or Annual plan features
□ GOLD plan features
□ PLATINUM plan features

GOLD and PLATINUM plans provide additional Advanced Logic features such as:
□ Random Assignment
□ Question Piping
□ Question Randomization

With the PLATINUM plan, you can take advantage of our white label feature. With this feature, you can remove Survey Monkey branding and use a "research.net" URL to distribute the survey.
Here is examples of some other things you can do with a Professional plan:
1. **No Limits** - You can create surveys with an unlimited number of questions, spanning an unlimited number of pages.
2. **Create Surveys from templates.**
3. **Create Skip Logic** (Conditional Logic) - You can customize the path a respondent takes through your survey by adding skip logic.
4. **Add a Logo** - Branding your survey gives it a professional feel.
5. **Create Custom Themes** - Every element of your survey can be customized: fonts, sizes, and colors.
6. **Embed Survey/Popup Surveys** -Embed the survey on your site or have it appear as a popup.
7. **Custom Redirect** - Once your survey is complete, respondents will be redirected to the page of your choice. (Available to GOLD and PLATINUM plans only.)
8. **Filter Results** - A powerful feature that helps you find patterns in your results. Ask questions such as: "Show me only those respondents who answered choice X in question Y." The entire results section will reflect your filter choices.
9. **Cross Tab Results** - Cross tabulated data is useful for showing a side by side comparison of how respondents answered two or more survey questions.

10. **Share Results** - Let others view your results without giving them access to your account.
11. **Download Results & Charts** - All data can be downloaded to your local computer for further analysis. Create custom charts for presentations.
12. **Create PDF** - Create a printable PDF version of your survey or the results.
13. **Custom Reports** - You can create custom reports to include only the questions in which you're interested. Export them or share them with others for easier data management and/or analysis.

Design Phase: How to create a survey

It's easy to create your own custom survey form using our Survey Editor within the Design section of your account. Select from over a dozen types of questions: multiple choice, rating scales, drop-down menus, and more! Powerful options allow you to require answers to any question, control the flow with custom skip logic, and even randomize answer choices to eliminate bias. You can change the color, size, and style of any element in your survey. Upload your own logo, and save custom themes to use on all your surveys.

Get started now by reviewing all of the basic Design elements below!

1. Creating a New Survey Form
2. Add Questions
3. Optional Question Formatting
4. Add Pages
5. Customize Your Design
6. Saving a Survey
7. Finished the Design? How to Send a Survey

Creating a New Survey Form

Step 1:
Click the [**Create Survey**] button located on the top right of all of the pages in your account to open the create survey page.

Step 2:
There are 3 different options you can use to create a new survey. Select one of those options to apply to your new survey form.

1. Create a new survey from scratch – will create a blank survey form that you can use to add your own questions

2. Copy an existing survey – can be used to create a copy of a survey form you have already created
3. Use a Survey Template – will allow you to select from our list of pre-designed survey forms that you can customize to fit your needs.

Add Questions

Click the [A**dd Question Here**] button in the location on the page you want your question to display. When the Question Editor window opens, select which Question Type you want from the drop-down menu at the top of the page. This will display all of the appropriate text fields where you can customize the question text, answer choices, etc. to format your question.

Additional Information:

- Adding questions - Learn more
- Question types - Learn more
- Font types and formatting - Learn more
- Bold, italics, underline, bullets, HTML, etc. - Learn more

Optional Question Formatting

In addition to being able to customize your question type, text and answer choices, you also have options to customize how each question looks and behaves for respondents. You can find these options listed in the Edit Question window by using the Scroll bar on the left hand side.

Click on any of the options below for more details about how each feature works.

- Sort/Randomize answer choices
- Add Comment Field
- Validate Text
- Require Answer to Question
- Change Question Size and Placement

You can use the following editing options within your main Survey Edit page, click on them for more details about how each edit option works:

- Move Question
- Copy Question

- Delete Question
- Restore Question

Add Pages

When you create a survey, the default Edit Survey page opens to page #1. Click the [**Add Page Before/After**] button to add a new page to your survey. In this page you can choose to insert a title for your page and include text for an introduction or description of the page. Click the [Split Page Here] button before any question to create a page break in your survey and divide the questions onto separate pages.

Learn more about adding pages or inserting page breaks: How can I insert a page break or split pages in my survey?

A. Edit Pages

You can use the following editing options within your main Survey Edit page, click on them for more details about how each edit option works:

- Move Page
- Copy Page
- Delete Page

B. Previewing Pages

You can look over you survey design in a few different ways to make sure it meets all of your specifications. Click on the options below for more details on how to review your design.

- Viewing Pages
- Preview your Survey
- Print your Survey Design

Customize Your Design

A. Survey Design Options

In addition to being able to customize your questions and pages, you also have options to customize specific design options for the whole survey. You can find these settings listed in the [**Survey Options**] section of the Design page.

You can use the following editing options within your main Survey Edit page, click on them for more details about how each edit option works:

- Edit Page and Question Numbering
- Add a Logo
- Progress Bar
- Hide/Display Survey and Page Titles
- Edit Navigation Links (Prev, Next, Done, Exit Survey)
- Required Questions

B. Themes

You can also customize the colors and fonts in your survey to help further brand your survey form and associate it with your own business colors and style templates. We offer a number of pre-created themes to select from (all of which are 508 compliant (U.S. Only)) or you can select a theme and then edit it to customize all of the colors and fonts to meet your specifications.

- Learn more: How can I edit the survey theme?

Saving the Survey

Every time you click any of the [**Save**] buttons (e.g. while saving a question, saving survey option settings, adding a page, creating skip logic, etc.) it saves your survey design up to that point. There is not one overall [Save] button. If you logout of your account and login later, your survey is saved under the **My Surveys**section.

You can then pick up where you left off by clicking the **Design** icon . This will open up the **Edit Survey** mode to show you all of the saved questions, pages, and settings.

How to Send/Publish the Survey

After the design process, you are ready to send it to an audience. Because this is an online application, respondents will access the survey using a link, or URL. In order

to get the link for distribution, the next step is to create a Collector. We offer several collection methods and these are dependent upon how you want to gather your data:

- Anonymously
- Track the identity
- Embed pop-ups
- Use social networks

To learn more about these collection methods, please move on to the Collector tutorial: How to Send the Survey.

Effective Survey Designs

For extra tips about designing effective surveys, see our Smart Survey Design Guide (*Currently only available in English).

Answers Others Found Helpful

- Advanced tutorial on Survey Monkey question types.
- The Collecting Responses tutorial explains what Collectors are and how you can distribute your survey to an audience.
- This tutorial provides information on how you can analyze your survey data by browsing and exporting responses, creating filters or cross tabs, etc.
- Use professionally designed templates to create surveys.
- Click the Add Question or Add Page button to insert new pages and questions into the design.

Deployment Phase: Collect Responses

What is a Collector?

A collector enables you to collect survey responses. After designing the survey, you are ready to distribute it via a link in an email message or post it on your webpage.
The type you pick determines how the survey is administered. We offer the following options:
□ The Web Link: Collect anonymous surveys by posting a link on a website, or email it using your own email.
□ The Email Invitation: Track respondents through "unique" links delivered by our mail server.
□ Embed/Popup Survey: Embed your survey on your website or display it in a popup window.

□ The Facebook Collector: Easily distribute your survey to your friends and colleagues on Facebook.
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These collector types are located under the **[Collect]** icon:
□ Each survey will have a Collectors page that lists each one created for it.
□ There are no limits to the number of collectors for Professional subscribers. However, the Basic subscription is limited to 3 collectors per survey.

Analysis Phase: How to Analyze Survey Responses

View your results anytime as they are being collected in real-time. Watch live graphs and charts, and then dig down to get individual responses. Securely share your survey results with others. Powerful filtering and crosstabulation allows you to display only the responses you're interested in. With one click, you can download a summary of your results in multiple formats. If you're a statistics nut, you can download all of the raw data you've collected as a spreadsheet. As a reminder, all the data you collect remains absolutely private.

The **Basic** version of Survey Monkey only offers 2 direct options for reporting results.

1. Summary Report
2. Browse Responses (by respondent)

The **Professional** version has the following analytical tool options.
Links to external help are as follows:

1. Viewing Survey Responses
2. Filter Survey Responses
3. Crosstab Survey Responses
4. Download Responses
5. Share Responses

Viewing Survey Responses

The responses for each page are saved and displayed in the analyze section after respondents click the navigation button and successfully advance to the next survey page.

A. Response Summary:

The Response Summary is the default Analyze page, but can also be accessed by clicking on the [**View Summary**] button in the left tool bar in the Analyze section. This page provides the Summary View of your survey results and displays information such as the number of respondents that answered each question, the percentages each answer option received and basic graphs among other data.

NOTE: Open-ended responses will not be visible directly on the Summary page. Please click the [**show replies**] button in the space where the open-ended question would be to see all of your respondents' comments.

B. Browse Individual Responses:

To view individual responses, click the [**Browse Responses**] button in the left tool bar in the Analyze section. The Browse Responses page will open to the most recently submitted response and will allow you to page through a full responses one by one. You can view collection information about each response in the header and can also *Edit* or *Delete* individual responses here.

Click on the options below for more details about how to use the Editing Features in the Browse Responses page:

- Delete Individual Responses
- Edit Individual Responses

C. Custom Reports:

Create a Custom Report by selecting the [**Add Report**] button next to the 'current report' drop-down menu at the top of the Response Summary page.

Custom Reports give customers an opportunity to create a new report and specify which questions or pages they would like to view in the Analyze page. Creating a custom 'view' of your survey data allows you to examine a set of correlated questions in one page instead of scrolling through the entire report to find and compare these questions.

Learn more: Will custom reports share only certain information or hide sensitive data?

Learn more: What is a Custom Report?

Filter Survey Responses

Create and manage filters for your data by clicking on the [**Filter Responses**] button in the left tool bar of the Analyze section.

Filtering allows you to organize and view subsets of data for advanced analysis. Filtered data will display only the set of full responses that match your filter criteria, allowing you to find patterns in your data more easily.

- Learn more: What are Filters?

Types of Filters Offered:
There are three types of filters we offer. Select one or more of these options in the Filter Response page to specify the criteria you wish to view in your survey results.

1. Filter by Response: Based on questions in the survey, you can pick specific answer choices to build a response-based filter. You can add multiple filters and combine them with a logical expression.
2. Filter by Properties: Based on specific properties recorded on the back-end by our system. These include Response Dates, Response Status, Email Address, First Name, Last Name, Custom Value, and IP Address.
3. Filter by Collector: Only active if you have multiple collectors created for the survey. Select the collectors whose responses you want to include in the results analysis.

Crosstab Survey Responses

Create and manage crosstabs for your data by clicking on the [**Crosstab Responses**] button in the left tool bar of the Analyze section.

Cross-tabulated data is useful for showing a side by side comparison of how respondents answered a particular question compared to the remaining questions they answered and determine how they are interrelated. The result is a table of the results, each column representing the group of respondents who selected a particular answer choice for the comparison question you selected.

- Learn more: What are Crosstabs?

Download Responses

You can download the responses you've collected at any time (yes, even while you are still receiving responses) with a Professional plan. We simply take a snapshot of your current responses, without disrupting your survey.

A. Downloading Individual Questions:

If you need to export one specific question rather than the entire survey, you have the ability to single it out and download only that question's results. This option is handy if you need to export open ended comments into a PDF format. You can download an individual question by clicking on the 'Download' link in the top right corner of your question on the Response Summary page.

- Learn more: Can I download individual questions?

B. Charting Individual Questions:

You are able to export a visual graph/chart that represents the data of an individual question directly from the Analyze, Response Summary page. This feature is available for most question types and will present your graph/chart in a PNG file type that you can save on your computer. You can chart an individual question by clicking on the 'Create Chart' link in the top right corner of your question on the Response Summary page.

- Learn more: Can I create custom charts?

C. Summary Download:

Summary Downloads can be accessed by clicking the [Download Responses] button in the Analyze section. This type of download will display the summarized version of all the responses you have collected. This will appear similar to the data you see in the View Summary page in the account. Each summary download format will display the same data set in a slightly different way.

- Learn more: How do I download my survey results?

D. All Responses Collected:

The All Responses Collected and Advanced Spreadsheet format can be accessed by clicking the [Download Responses] button in the Analyze section. This type of download includes all survey responses individually listed out in a single Excel Spreadsheet. Every row in the spreadsheet contains the full set of survey answers for one respondent.

- Learn more: How do I read the All Responses Collected Spreadsheet in Excel?

Share Responses

Sharing Responses enables you to provide direct access to a specific set of survey results without giving access to your account. With this feature, you can control how much detail to share by choosing between a variety of access level settings.

- Create a share link by clicking on the [**Share Responses**] button in the left tool bar in the Analyze section.
- Sharing Responses enables you to provide direct access to a specific set of survey results without giving access to your account. With this feature, you can control how much detail to share by choosing between a variety of access level settings.

  - Learn more: Can I share survey results with others?

Answers Others Found Helpful *(Links to external help)*

- We offer six export options that deliver your data in either raw or summary formats. Open-ended comments are also included in most formats.
- Crosstabs show a side by side comparison of two or more survey questions to determine how they are interrelated.
- Professional subscribers can privately share the results with others by using the Share Responses feature.
- Filters allow you to look for specific data or patterns within the results.
- Delete individual responses using the Browse Responses feature in the Analyze section.